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TO: Doug Nelson

DATE: December 6, 1990

FROM: Laurie Funness

Laurie

SUBJECT: BRISTOL SPACE DISTRIBUTION
AS OF 11/25/90

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This report updates Bristol's SPACE distribution in the Expansion and Original markets.

BACKGROUND

In December 1989, Bristol was launched into a number of markets accounting for 39% of U.S. retail accounts. Four Lights packings were introduced - King Size Regular/Menthol, and 100's Regular/Menthol.

In May 1990, Bristol's retail presence was expanded as follows:

- Four additional packings were added to the Original markets: Full Flavor Kings and 100's, Ultra Lights 100's and Non-Filter Kings.
- Expansion I markets were opened up with the introduction of all 8 Bristol packings.

On September 10, 1990 all eight Bristol packings were made available to the remainder of the U.S. (Expansion II markets. - See map.) After 11 weeks at retail, distribution is at 11%.

HIGHLIGHTS

Expansion I Markets - (See Charts 1-3/Tables 1-2.)

- need report?*
- After 30 weeks, Bristol's distribution of at least one packing has reached 40%, with eighty percent (80%) of these outlets carrying all eight (8) packings.
 - Accounts with Bristol in distribution cover approximately 41% of the industry volume in these Expansion markets.
 - Distribution in the Expansion markets is higher in independents (46%) than chains (34%).

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*what good
divisions say?*

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- Within independents, Bristol's distribution increases with store volume, with low volume (under 300 cpw) at 43% and high volume (1000+ cpw) outlets at 62%.

Chain outlet distribution on the other hand, tends to be higher among low volume (under 300 cpw) outlets at 36% versus all other (300+ cpw) outlets at 28%.

- By trade class, distribution lags the ownership average as follows:

	<u>Dist.</u>		<u>Dist.</u>
<u>Chains</u>	<u>34%</u>	<u>Indep.</u>	<u>46%</u>
Mass Merch.	9%	Drug	29%
Gas	17%	Gas	30%
Convenience	27%	Liquor	42%
Supermarkets	30%	Grocery	42%

Original Markets - (See Charts 1, 2, and 4/Tables 3-4.)

- After 50 weeks, distribution of at least one packing is at 48% in the Original market areas. Seventy-five percent (75%) of these outlets are carrying all 8 packings. This compares with 80% in the Expansion areas, where all 8 packings were offered simultaneously at launch.
- The stores comprising Bristol's distribution (48%) account for approximately 53% of the industry volume in the Original markets.
- On average, the stores with Bristol are carrying 7.1 packings in the Original areas versus 7.3 packings in the Expansion markets.
- Distribution in the Original markets is also higher in independents (57%) versus chains (38%), both overall and with regard to each of the 8 packings.
- Bristol's distribution levels are higher in 300+ cpw outlets for both independents and chains, whereas in the Expansion markets this is only true for independents.

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BRISTOL SPACE DISTRIBUTION
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- By trade class, distribution lags the ownership average as follows:

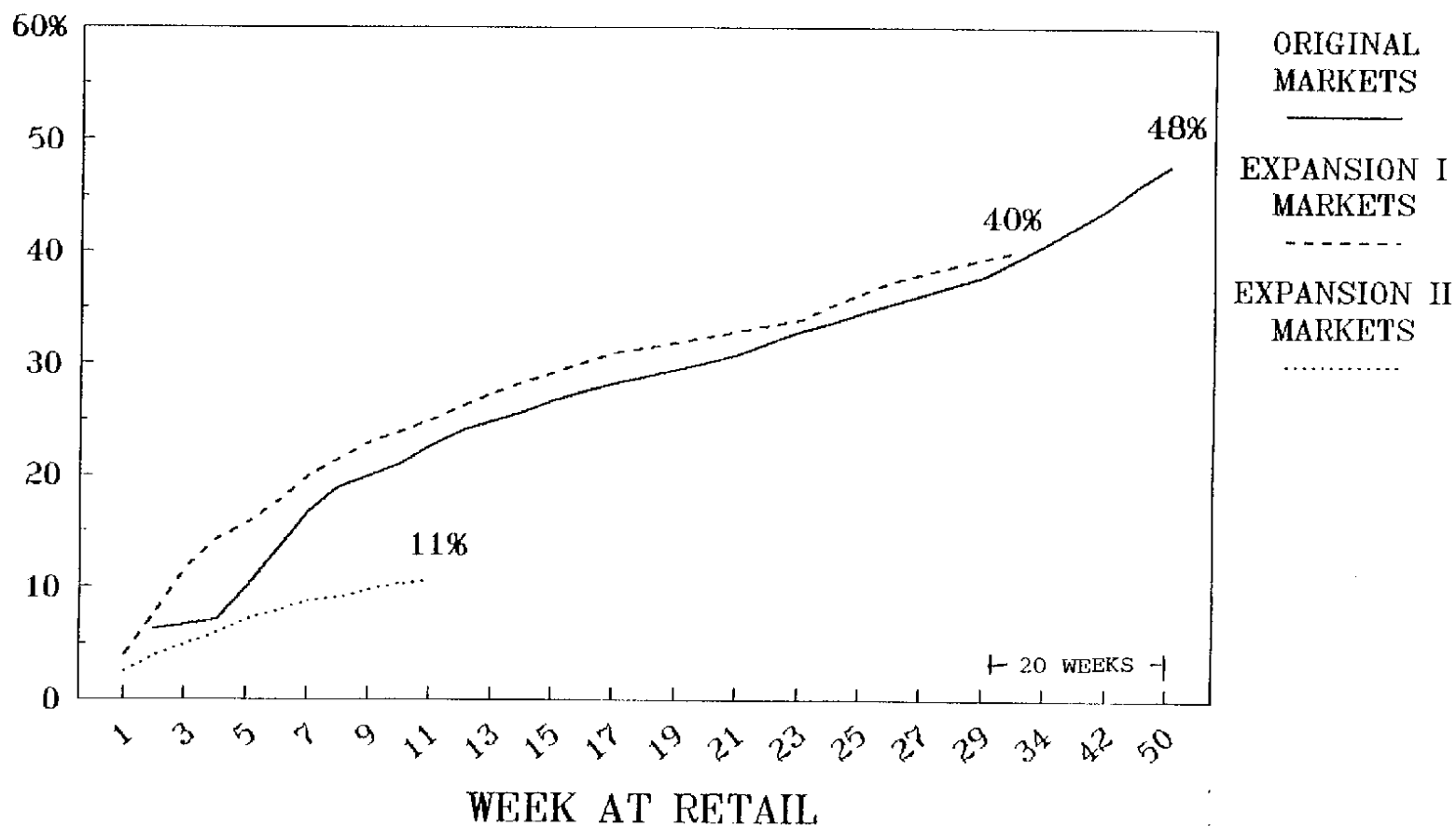
	<u>Dist.</u>		<u>Dist.</u>
<u>Chains</u>	<u>38%</u>	<u>Indep.</u>	<u>57%</u>
Whlse. Clubs	21%	Gas	40%
Mass Merch.	20%	Liquor	43%
Convenience	29%	Drug	48%
Gas	32%	Convenience	52%
Liquor	33%		

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BRISTOL

PERCENT DISTRIBUTION OF AT LEAST ONE PACKING

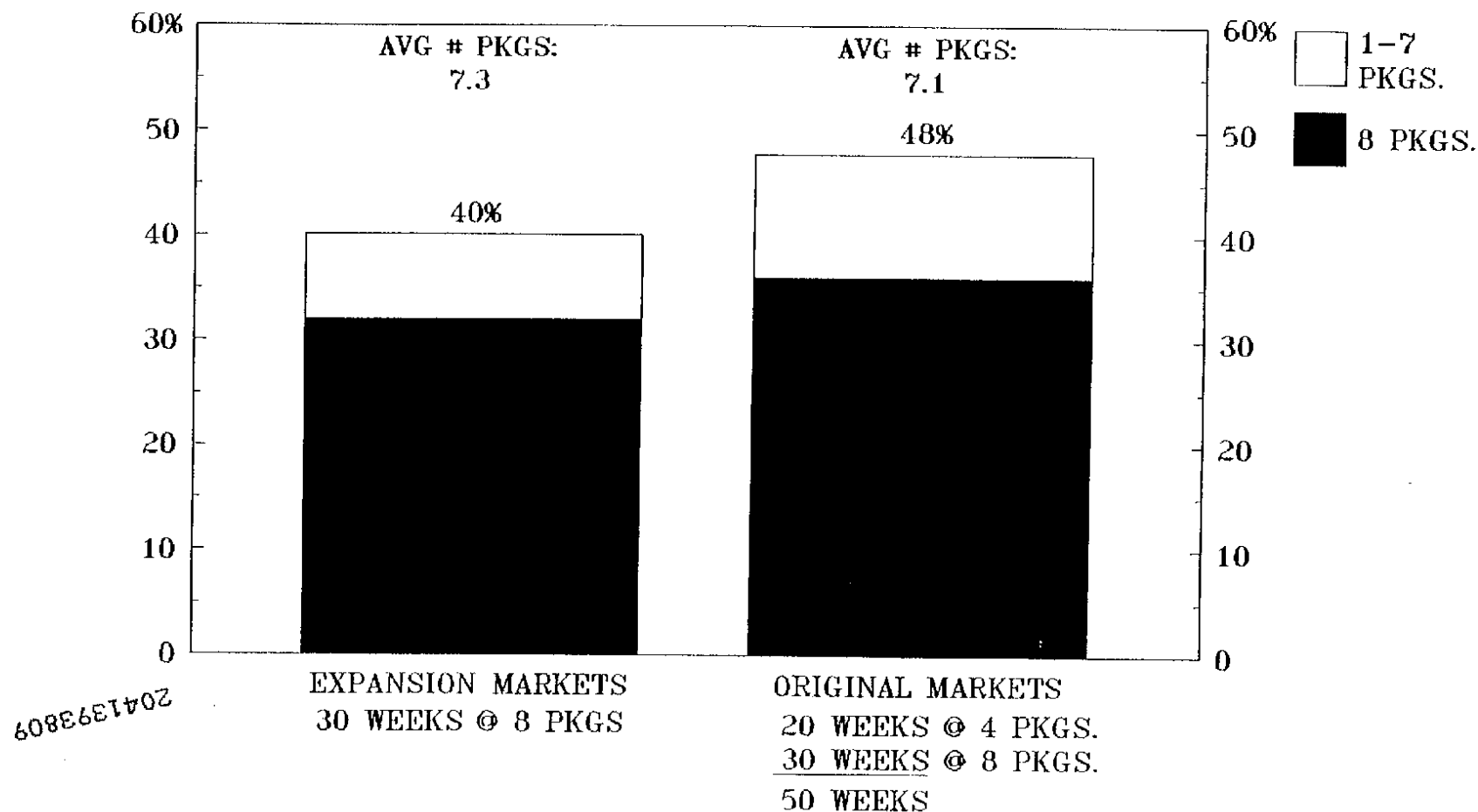


SOURCE: SPACE

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BRISTOL DISTRIBUTION

(TOTAL = % CARRYING AT LEAST 1 PACKING)



INTRO DATES:

12/17/89 - LTS REG, LTS MEN, LTS 100's REG, LTS 100's MEN

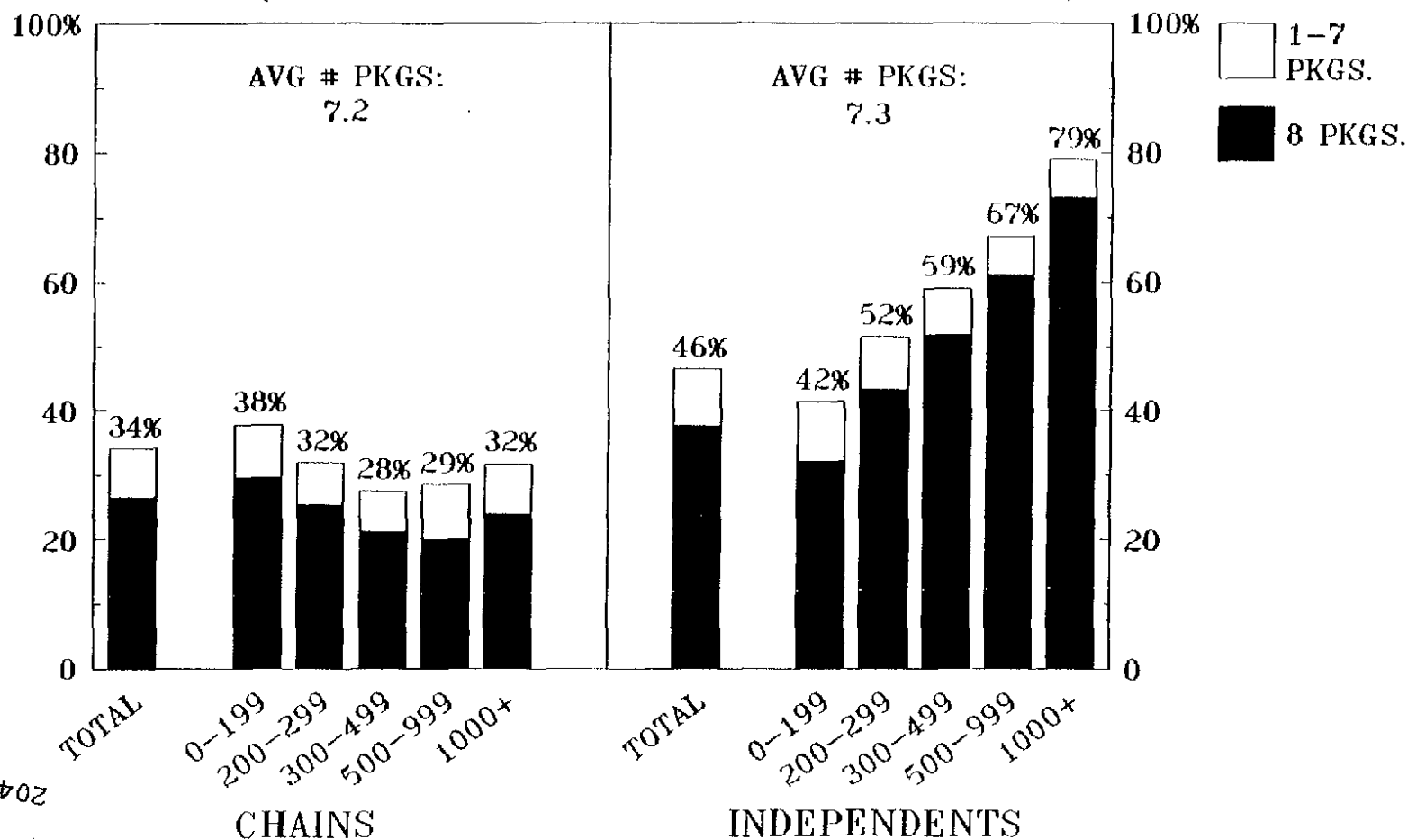
4/30/90 - FF 85's, FF 100's, ULTRA LTS 100's, NON-FLT' KINGS

SOURCE: SPACE 11/25/90

BRISTOL DISTRIBUTION – EXPANSION I MARKETS

30 WEEKS @ 8 PKGS.

(TOTAL = % CARRYING AT LEAST 1 PACKING)



INTRO DATE:

4/30/90 – LTS REG, LTS MEN, LTS 100's REG, LTS 100's MEN,
FF 85's, FF 100's, ULTRA LTS 100's, NON-FLT KINGS

SOURCE: SPACE 11/25/90

BRISTOL DISTRIBUTION
 PROFILE DATA AS OF CYCLE 11 WEEK ENDING 90/11/25
 EXPANSION I MARKETS

		TOTAL STORES	% WITH ANY PKG	LTS REG	LTS MEN	LTS 100 REG	LTS 100 MEN	FF REG	FF 100 REG	ULT LTS 100	N-FLT KGS
CHAIN	SUPERMKT	4644	29.5	26.5	23.7	27.7	26.0	23.8	24.7	24.7	21.7
	CONV	3038	26.5	24.2	21.2	24.4	22.6	24.7	24.6	20.4	19.4
	CONV/GAS	14233	43.9	42.0	38.5	42.4	39.4	41.9	42.0	37.6	36.3
	GROCERY	211	39.3	36.5	34.1	37.4	36.0	33.6	35.5	34.6	31.3
	DRUGS	4106	33.0	31.9	28.3	31.9	31.4	30.5	30.4	31.0	26.2
	MASS	1871	8.6	8.0	7.4	8.0	7.6	7.5	7.4	7.5	6.9
	LIQ	239	33.5	31.0	30.1	30.5	31.4	32.6	30.5	30.5	28.9
	GAS	1871	17.0	15.5	15.1	15.7	15.8	15.5	15.2	14.8	14.2
	NEWS	254	6.3	6.3	6.3	6.3	6.3	6.3	6.3	5.9	6.3
	WHL CLUB	65	41.5	41.5	41.5	41.5	41.5	41.5	41.5	41.5	36.9
	REST	10	.0	.0	.0	.0	.0	.0	.0	.0	.0
	A/O	118	17.8	14.4	13.6	16.1	15.3	16.1	14.4	14.4	12.7
CHAIN		30660	34.2	32.3	29.4	32.7	30.8	31.7	31.8	29.4	27.5
INDEF	SUPERMKT	2415	53.4	50.6	50.8	51.1	50.5	50.9	49.8	48.9	48.0
	CONV	3280	47.2	43.9	42.7	44.0	43.3	44.0	44.0	41.3	38.3
	CONV/GAS	10792	53.7	51.6	50.6	51.6	50.9	51.6	51.1	49.6	47.5
	GROCERY	6155	42.3	38.2	38.0	37.9	37.7	38.5	37.7	35.3	34.4
	DRUGS	1232	28.7	24.8	24.3	25.1	24.4	25.3	24.4	22.8	21.8
	MASS	106	50.0	46.2	47.2	47.2	46.2	47.2	47.2	46.2	46.2
	LIQ	2126	42.1	38.3	37.4	38.5	37.3	39.4	38.3	35.6	32.9
	GAS	1042	29.8	28.2	27.6	28.0	27.1	28.1	27.7	26.5	24.9
	NEWS	803	25.3	22.5	22.3	23.2	22.2	22.7	22.4	21.5	20.3
	WHL CLUB	7	28.6	14.3	28.6	14.3	14.3	14.3	14.3	14.3	14.3
	REST	142	21.8	16.9	16.9	17.6	17.6	19.7	16.2	13.4	14.1
	A/O	685	38.2	35.0	34.3	34.7	33.7	35.0	33.4	32.7	30.1
INDEF		28785	46.4	43.4	42.7	43.4	42.8	43.6	43.0	41.1	39.3
TOTAL		59445	40.1	37.7	35.8	37.9	36.6	37.5	37.2	35.1	33.2

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TABLE 1

BRISTOL DISTRIBUTION AND VOLUME COVERAGE
EXPANSION I MARKETS
PROFILE DATA AS OF CYCLE 11 WEEK ENDING 90/11/25
FOCEXEC: (LF0919) RUNDATE: 12/04/90

OWNERSHIP	TRADECLASS	TOTAL STORES	TOTAL CPW VOLUME	% DIST ANY BRISTOL	BRISTOL ACCTS CPW VOLUME	BRISTOL ACCTS % OF MKT CPW VOLUME
CHAIN	SUPERMKT	4,444	2,496,735	29.5	746,845	29.9
	CONV	3,038	523,865	26.5	127,880	24.4
	CONV/GAS	14,233	2,370,385	43.9	984,840	41.5
	GROCERY	211	69,355	39.3	29,995	43.2
	DRUGS	4,106	738,975	33.0	267,430	36.2
	MASS	1,871	738,485	8.6	92,610	12.5
	LIQ	239	35,265	33.5	18,735	53.1
	GAS	1,871	418,660	17.0	81,605	19.5
	NEWS	254	23,840	6.3	4,610	19.3
	WHL CLUB	65	163,380	41.5	68,300	41.8
	REST	10	1,265	.0	0	.0
	A/O	118	59,880	17.8	21,525	35.9
*TOTAL OWNERSHIP CHAIN		30,660	7,640,090	34.2	2,444,375	32.0
INDEP	SUPERMKT	2,415	1,041,000	53.4	605,540	58.2
	CONV	3,280	462,170	47.2	259,430	56.1
	CONV/GAS	10,792	1,537,765	53.7	899,815	58.5
	GROCERY	6,155	970,420	42.3	484,250	49.9
	DRUGS	1,232	191,180	28.7	73,665	38.5
	MASS	106	31,890	50.0	17,175	53.9
	LIQ	2,126	333,140	42.1	175,035	52.5
	GAS	1,042	166,250	29.8	68,190	41.0
	NEWS	803	134,840	25.3	57,655	42.8
	WHL CLUB	7	20,470	28.6	2,000	9.8
	REST	142	15,665	21.8	4,140	26.4
	A/O	685	265,090	38.2	197,075	74.3
*TOTAL OWNERSHIP INDEP		28,785	5,169,880	46.4	2,843,970	55.0
TOTAL		59,445	12,809,970	40.1	5,288,345	41.3

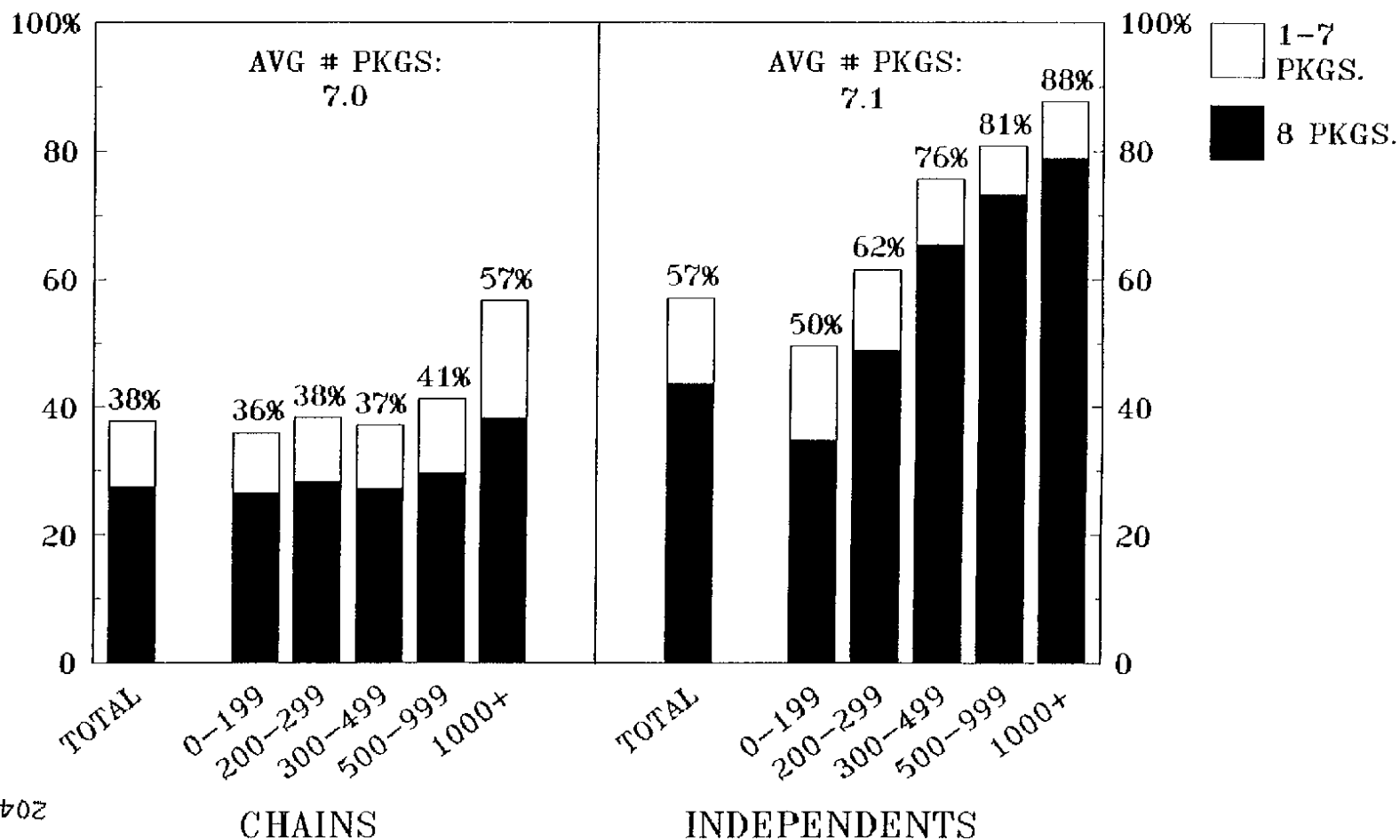
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BRISTOL DISTRIBUTION – ORIGINAL MARKETS

20 WEEKS @ 4 PKGS.

30 WEEKS @ 8 PKGS.

30 WEEKS



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INTRO DATES:

12/17/89 – LTS REG, LTS MEN, LTS 100's REG, LTS 100's MEN

4/30/90 – FF 85's, FF 100's, ULTRA LTS 100's, NON-FLT KINGS

SOURCE: SPACE 11/25/90

BRISTOL DISTRIBUTION
 PROFILE DATA AS OF CYCLE 11 WEEK ENDING 90/11/25
 ORIGINAL MARKETS

		TOTAL STORES	X WITH ANY PKG	LTS REG	LTS MEN	LTS 100 REG	LTS 100 MEN	FF REG	FF 100 REG	ULT LTS 100	N-FLT KGS
CHAIN	SUPERMKT	7737	40.6	39.4	38.5	39.2	39.0	31.8	31.1	31.0	29.7
	CONV	3137	28.7	27.4	25.9	27.1	27.0	24.6	24.5	23.3	21.9
	CONV/GAS	19222	40.9	39.5	38.3	39.2	39.1	35.6	35.5	34.2	32.6
	GROCERY	326	63.2	62.0	60.7	62.0	60.4	53.7	53.7	52.1	50.6
	DRUGS	5409	42.7	41.7	38.2	40.6	40.9	31.8	31.3	31.4	27.9
	MASS	3593	20.3	19.5	19.3	19.3	19.3	16.9	16.7	16.7	16.1
	LIQ	395	33.2	31.4	30.9	31.4	31.4	30.1	29.1	28.9	27.8
	GAS	2865	31.6	29.9	29.9	29.9	29.7	25.8	25.2	24.2	23.8
	NEWS	199	5.0	4.5	4.5	4.5	4.5	5.0	4.5	4.5	4.5
	WHL CLUB	72	20.8	20.8	20.8	20.8	20.8	20.8	20.8	20.8	19.4
	REST	24	25.0	25.0	20.8	25.0	25.0	25.0	20.8	25.0	25.0
	A/O	196	45.9	45.9	45.4	45.9	44.9	37.8	38.3	38.3	38.3
CHAIN		43175	37.8	36.5	35.2	36.2	36.1	31.4	31.1	30.3	28.7
INDEP	SUPERMKT	5036	71.6	70.2	69.9	70.1	69.9	63.3	63.1	62.7	61.4
	CONV	3768	52.0	49.0	48.1	48.6	48.1	44.5	44.4	42.5	40.5
	CONV/GAS	19002	56.7	54.5	53.4	53.8	52.8	49.0	48.5	46.9	44.7
	GROCERY	10853	61.6	59.2	58.1	58.4	57.6	52.3	51.8	50.1	48.4
	DRUGS	1756	48.2	45.7	45.1	45.7	45.1	41.1	40.1	39.1	38.2
	MASS	254	66.1	65.0	64.6	64.2	65.0	59.8	59.4	58.3	58.3
	LIQ	2377	43.2	40.6	40.3	40.0	39.4	35.6	34.8	33.4	32.2
	GAS	1521	38.9	36.8	36.4	36.2	35.8	32.5	32.0	30.9	29.8
	NEWS	743	29.2	27.9	27.6	27.6	27.1	26.1	25.8	25.0	24.9
	WHL CLUB	6	50.0	50.0	50.0	50.0	50.0	33.3	33.3	33.3	33.3
	REST	92	46.7	44.6	43.5	44.6	42.4	42.4	43.5	43.5	44.6
	A/O	959	60.0	57.2	56.7	57.9	57.5	53.9	53.8	53.4	53.2
INDEP		46367	57.1	54.9	54.0	54.3	53.6	49.2	48.8	47.3	45.6
TOTAL		89542	47.8	46.0	45.0	45.6	45.1	40.6	40.2	39.1	37.4

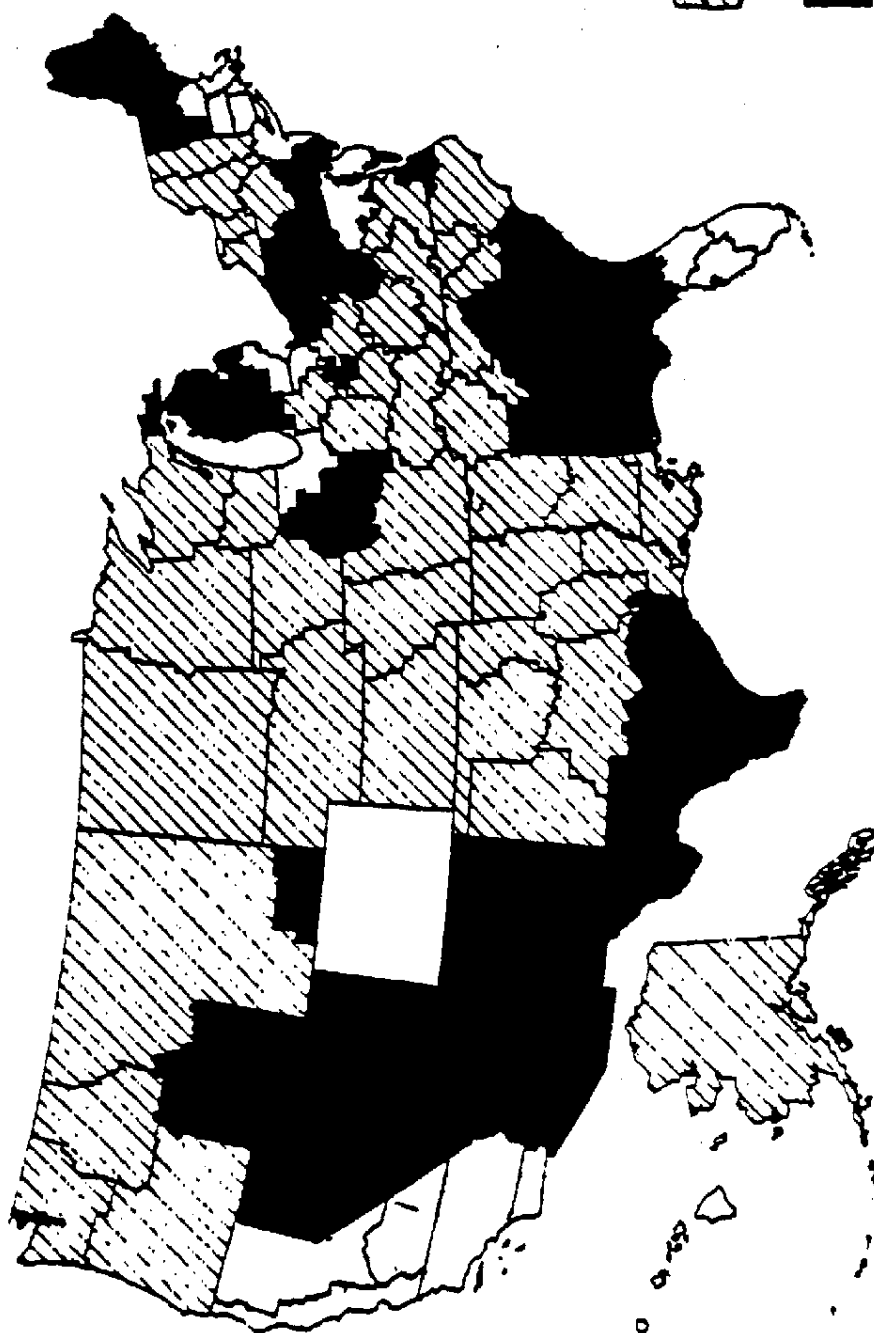
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BRISTOL DISTRIBUTION AND VOLUME COVERAGE
ORIGINAL MARKETS
PROFILE DATA AS OF CYCLE 11 WEEK ENDING 90/11/25
FOCEXEC: (LF0919) RUNDATE: 12/04/90

OWNERSHIP	TRADECLASS	TOTAL STORES	TOTAL CPW VOLUME	% DIST ANY BRISTOL	BRISTOL ACCTS CPW VOLUME	BRISTOL ACCTS % OF MKT CPW VOLUME
CHAIN	SUPERMKT	7,737	4,384,695	40.6	1,955,930	44.6
	CONV	3,137	593,290	28.7	179,670	30.3
	CONV/GAS	19,222	3,543,540	40.9	1,516,335	42.8
	GROCERY	326	111,630	63.2	73,265	65.6
	DRUGS	5,409	992,340	42.7	464,360	46.8
	MASS	3,593	1,160,090	20.3	262,375	22.6
	LIQ	395	53,785	33.2	26,965	50.1
	GAS	2,845	567,785	31.6	204,500	36.0
	NEWS	199	17,640	5.0	4,415	25.0
	WHL CLUB	72	240,240	20.8	53,075	22.1
	REST	24	3,585	25.0	1,305	36.4
	A/O	196	98,620	45.9	51,770	52.5
*TOTAL OWNERSHIP CHAIN		43,175	11,767,240	37.8	4,793,965	40.7
INDEF	SUPERMKT	5,036	2,345,780	71.6	1,791,060	76.4
	CONV	3,768	593,910	52.0	366,460	61.7
	CONV/GAS	19,002	2,922,700	56.7	1,843,085	63.1
	GROCERY	10,853	1,843,385	61.6	1,274,625	69.1
	DRUGS	1,756	272,145	48.2	167,015	61.4
	MASS	254	107,105	66.1	91,725	85.6
	LIQ	2,377	339,330	43.2	194,950	57.5
	GAS	1,521	261,170	38.9	131,925	50.5
	NEWS	743	105,975	29.2	57,270	54.0
	WHL CLUB	6	3,715	50.0	2,075	55.9
	REST	92	16,270	46.7	11,230	69.0
	A/O	959	667,025	60.0	547,695	82.1
*TOTAL OWNERSHIP INDEF		46,367	9,478,510	57.1	6,479,115	68.4
TOTAL		89,542	21,245,750	47.8	11,273,080	53.1

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BRISTOL MARKETS



ORIGINAL MARKETS

EXPANSION I MARKETS

BALANCE OF U.S.
(EXPANSION II
MARKETS)

APPENDIX

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